

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Enhanced Customer Relationship Management - Consolidated Call Center

Improve customer satisfaction by proactively seeking customers' input, and "reaching out" to train and assist them with all SFA-related concerns. This initiative includes the consolidation of multiple call center capabilities to provide "one-call-does-it-all" functionality for customers.

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
1	Students	Customer Satisfaction Mgt	Consolidated Customer Call Center	Establish one toll-free number for student customer service. Make account info on loan balances, payment histories, and other general account info available 24 hours per day, 7 days per week.		High	Create Consolidated SFA Plan	CSTF	Multiple options and issues exist around this concept and implementation. Suggest full development of business case and analysis of all options to find one that fits SFA needs.

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Initiative:

Enhanced Aid Awareness

Enhance all programs designed to inform the public of the availability of student financial assistance and educate them on various aid options and processes of applying for aid.

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2	Students	Aid Awareness	Collect Fin Aid Packaging Info (pilot)	Collect financial aid packaging info from multiple schools that a student may wish to attend to allow comparison of packages by the student.	Allows students to make informed decisions about the specific aid packages offered to them by various schools. Improve customer service.	Medium	Continue - Project not yet Started	Blueprint	<p>This proposal requires active cooperation by schools, but is likely to be actively opposed.</p> <p>Several community members listed opposition to this idea on the Community Feedback website.</p> <p>The proposal puts ED in the position of appearing to play schools off against each other on one dimension (aid package) while ignoring other dimensions such as education quality, job placement rates, etc. Also, providing school comparisons is not part of the core mission. Finally, this information is provided by and will continue to be provided by the individual schools, and prospective students can make the comparisons using the awards package provided by the school.</p>

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Initiative: Enhanced Electronic FAFSA
Improve the electronic FAFSA through various modifications including the acceptance of data input through alternative means (e.g., tax preparer software), the creation of an electronic Spanish language FAFSA, and other value creating enhancements to the electronic FAFSA.

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3	Students	WEB	*Tax information prepopulation			High	Create Consolidated SFA Plan		
4	Students	Aid Application	Spanish FAFSA on the Web CPS	States/territories with large Spanish-speaking populations only have the English FAFSA to provide to their Spanish-speaking students. Since we are attempting to increase the number of electronic applications, this would provide an electronic application in Spanish.		High	Create Consolidated SFA Plan	Blueprint/CSTF	Need justification of cost savings and/or quantified improvements in customer service Should include Spanish language output.
5	Students	WEB	FAFSA on the Web			Medium	Continue - Project in Progress		
6	Students	WEB	FAFSA Express			Medium	Continue - Project in Progress		
7	Students	CPS/EDEx press	FISAP Software, Version 3.0			Medium	Continue - Project not yet Started		There is a project on the IRB list to use NSLDS data for FISAP. Need to ensure these are not mutually exclusive.
8	Students	Aid Application	PLUS Redesign (FAFSA)	Analysis of matching parental data for plus eligibility.		Low	Continue - Project not yet Started	Blueprint	

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9	Students	Aid Application	IRS Match Pilot	The Higher Education Amendments of 1998 authorize ED to confirm certain Title IV applicant income information with IRS data. In 2000-2001, ED will do a pilot with schools to determine impact of an IRS match on financial aid administration at the school l	Based on a study conducted in 1995-96, ED's Inspector General has determined that more than \$100 million could be saved by performing an IRS match on Title IV applicants and their parents.	Medium	Continue - Project not yet Started	Blueprint/CSTF	Should clarify savings. Estimate appears to be based on dollar value of loans denied rather than default losses on loans made which should have been denied.
10	Students	FFEL:	SSA and HUD Data Exchange/Tape Processing			Medium	Continue - Project not yet Started	Legislation	Need more detail. Should facilitate debt collections.
11	Students		WIN 2000 testing for EDEExpress CPS	This initiative is necessary to ensure that EDEExpress continues to function properly after the release of Microsoft (MS) Windows 2000.		Low	Continue - Project not yet Started		
12	Partners		799 on the Web	Interactive, web-based form will need to be produced. (PAR047) Let lenders have the option of monthly instead of quarterly reporting. (PAR048).		Low	Create Consolidated SFA Plan	CSTF	Underway at FFEL.

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Initiative: Financial Management System (FMS)
Validate the current SFA financial management system, design an integrated financial management system to manage the flow of financial information across all SFA information systems, and analyze the financial impact of this conversion.

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13	Students	DL/CDS & DL/SS:	Replace FARS w/ Oracle Financial			Medium	Continue - Project not yet Started	Blueprint	
14	CFO		Financial Management Systems	Create a "best in business" financial management and accounting system.		High	Continue - Project in Progress	Blueprint	Will have affect on other systems.
15	Partners		Redesign Lender Rprt sys. for a relational database	Current system operating in hierarchical database. User access is limited to rigid parameters. The users need more flexible access to the data. Users require the system to take advantage of technology that provides a more robust method of data collect	Reduction of storage requirements for Interest Payment system of 50%	High	Create Consolidated SFA Plan		

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Initiative:

IT Management - IT Management Plan

Create a plan to manage the various analysis/ design enterprise-wide architecture changes slated to occur in the SFA IT environment.

Line Num	Channel	Category	Project	Description	Benefits	Risk	Reccomendation	Blueprint/CSTF	Comments
16	CIO	IT Mgt	Tools Standardization	Select standardized tool set for modernization including CASE tool, web development tools, DBMS, requirements tracability, QA, CM, and development lifecycle.	Increased efficiency and accuracy, greater system integrity and reduced costs.	High	Create Consolidated SFA Plan	Blueprint	Sterling tools standard? Others (other than tracability - see redundant item above) should be held off until standards determined.
17	CIO	IT Mgt	IV&V	Perform independent validation and verification for newly developed systems	Decrease in errors, which improves customer satisfaction and reduces cost.	Low	Continue - Project not yet Started	Blueprint	Look hard at the cost / benefit on this, consider decreasing scope to high risk items only. This is a process or lifecycle issue more than a project.
18	CIO	IT Mgt	Help Desk Support Standardization	Consolidate and use standardized tools for help desk support, complaint tracking, and related activities.	Increased customer support and lower costs.	High	Create Consolidated SFA Plan	Blueprint	Potentially good idea within overall context to be determined
19	Schools		Independent Quality Assurance Unit for RFMS		The major benefits to this initiative is that the contractor gets a complete and thorough review of deliverables prior to submission to ED. This allows ED staff more time to manage the project rather than reviewing each of the major deliverables.	Low	Continue - Project not yet Started		

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20	CIO	IT Mgt	METHOD 1	ADAPTING THE METHOD 1 METHODOLOGY TO THE OSFA ENVIRONMENT AND TRAIN OSFA STAFF IN IT'S USE.		Medium	Continue - Project not yet Started	Blueprint	May only be necessary for a select few IT staff if IV&V contracted
21	CIO	IT Mgt	Enterprise Requiremnts	Provide a requirements tool for providing tracability, configuration management and visibility for the requirements for each process area.	Increased software accuracy, reduced costs and improved customer service.	High	Create Consolidated SFA Plan	Blueprint	Important at the early stage of modernization for process and configuration control
22	OCIO	Enterprise Supt	4. Tools Standardization			High	Cancel		Duplicate of IRB
23	CIO	IT Mgt	Enterprise Requirements Database	Provide a requirements tool for providing tracability, configuration management and visibility for the requirements for each process area.	Increased software accuracy, reduced costs and improved customer service.	High	Create Consolidated SFA Plan	Blueprint	Important at the early stage of modernization for process and configuration control
24	OCIO	Enterprise Supt	3. System Sizing Analysis			High	Cancel		Duplicate of IRB
25	CIO	Enterprise Supt	Implement Standards and Tools			High	Create Consolidated SFA Plan		Assuming this refers to current VDC SOP project.
26	CIO	Enterprise Supt	1. Investment Management Implementation			High	Create Consolidated SFA Plan		
27	Students	Derivative System Products	Need Analysis Servicers			Low	Continue - Project in Progress		

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Initiative: IT Management - Enterprise Data Standardization
Develop data standards to improve data integrity.

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28	CIO	Enterprise Supt	2. Enterprise Encyclopedia/Data Model Management			High	Create Consolidated SFA Plan		

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Initiative:

IT Management - Enterprise Architecture Design for DSS

Complete planning and analysis/design for enterprise-wide architecture for decision support system (DSS).

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29	CIO	Enterprise Supt	Decision Support System			High	Create Consolidated SFA Plan		
30	CIO	IT Mgt	Decision Support System	Use data warehousing to provide management reporting, trend analysis, and other assessment functions.	Improved management information which could contribute to improved customer service and reduced costs.	High	Create Consolidated SFA Plan	Blueprint	Modernized technical architecture undetermined at this time
31	CIO	Enterprise Supt	1. Establish Decision Support System			High	Create Consolidated SFA Plan		

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Initiative: IT Management - Enterprise Architecture Design for Integration
Complete planning and analysis/design for enterprise-wide architecture for middleware.

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32	CIO	IT Mgt	Data Center Intranet/Host Computer Access Layer	Procure, license, & install middleware & related support for initial integration of OFSA databases.		High	Create Consolidated SFA Plan	Blueprint/CSTF	
33	CIO	IT Mgt	Enterprise Encyclopedia Management	Provide configuration management for all enterprise models including the data model, process model, and code.	Provides standardization for data. Allows reuse of code and will reduce costs.	High	Create Consolidated SFA Plan	Blueprint	
34	CIO	Enterprise Supt	1. Data Center Intranet/Host Computer Access Layer			High	Create Consolidated SFA Plan		
35	CIO	IT Mgt	Create Enterprise models	Develop standardized logical data model and process models.	Provides standardization for data. Allows reuse of code and will reduce costs.	High	Create Consolidated SFA Plan	Blueprint	

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Initiative: IT Management - Enterprise Architecture Design for Internet
Complete planning and analysis/design for enterprise-wide architecture for the internet.

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36	CIO	IT Mgt	Web Standardization	Develop a standard look and feel for multiple web development projects. Create a standard web technical and security infrastructure.	Improved customer service and reduced costs.	High	Create Consolidated SFA Plan	Blueprint	Should be done at the enterprise level as a service to each program area.
37	COO		Intranet for OSFA Employees	Create an intranet that allows better dissemination of information and more and improved online processing of employee-related actions (such as time and attendance, training, etc.)		Low	Create Consolidated SFA Plan	Blueprint/CSTF	
38	Students	Aid Application	ACES Development for CPS	By implementing a pilot w/ the GSA ACES program, ED will be allowing constituents nationwide to begin using a gov't-standard digital signature for accessing personal records & digitally		High	Create Consolidated SFA Plan	Blueprint/CSTF	Should analyze savings arising from use of digital signatures in multi-year promissory note and FAFSA context.
39	CIO	IT Mgt	TIVWAN Implementation/Internet	Convert partner interfaces from a private network to the Internet.		High	Create Consolidated SFA Plan		Partners in this context means legacy contractors using leased lines.

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40	CIO		System Sizing Analysis	Perform capacity planning and performance analysis to determine the required hardware and storage for modernization.		High	Create Consolidated SFA Plan	Blueprint	This should be a function of IT management, not a separate effort
41	CIO	IT Mgt	Security Services Infrastructure	Create a system security infrastructure, including standardization.	Increased customer support and system integrity.	High	Create Consolidated SFA Plan	Blueprint	Good idea - should be pursued after technical standards are selected
42	CIO	WEB/PIN	*Provide PINs to schools to increase web access			High	Cancel		Duplicate of other project.
43	OCIO	Enterprise Supt	4. Security Services Infrastructure			High	Cancel		Duplicate of IRB
44	CIO	Enterprise Supt	2. TIVWAN Web Interface for On-line Query			High	Create Consolidated SFA Plan		
45	CIO	WEB/PIN	*Provide PINs to schools to increase web access			Medium	Create Consolidated SFA Plan		Digital Certificates and GSA ACES program being investigated as a global solution. Needs to encompass all systems and users.
46	Schools		TIVWAN/Internet interface	Modify LO/RFMS/NSLDS for TIVWAN/Internet interface		High	Create Consolidated SFA Plan		CPS should be added to this initiative
47	CIO	WEB/PIN	ACES			High	Create Consolidated SFA Plan		
48	CIO	TIV WAN	TIV WAN Enrollment web site			High	Continue - Project in Progress		

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49	CIO	IT Mgt	TIVWAN Web Interface (online query)	TIV WAN customers access data transmission history/statistics, distribution information via TIV WAN online query.	This initiative will support ED's effort to provide a common interface for data transmission/batch processing/distribution information.	High	Create Consolidated SFA Plan		Conversion of TIVWAN to web needs to address mailbox function
50	CIO	IT Mgt	CIO Intranet	Create an Intranet for CIO to have on-line access to acquisition procedures, SDLC documentation, enterprise encyclopedia, & other info needed for application development & CIO mgt.		Low	Create Consolidated SFA Plan	Blueprint	
51	CIO	WEB/PIN	PIN Registration			High	Continue - Project in Progress		
52	CIO	Enterprise Supt	2. Web Standardization			High	Create Consolidated SFA Plan		

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Initiative: IT Management - Enterprise Architecture Design for CTI
Complete planning and analysis/design for enterprise-wide architecture for computer telephony (CTI).

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53	Students	Derivative System Products	Phone Log File			Low	Continue - Project in Progress		
54	COO		Electronic Yellow Pages for OSFA	Create an electronic directory of "who does what" in OSFA to enable calls to be referred correctly.		Low	Continue - Project not yet Started	Blueprint/CSTF	

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Initiative:

Enterprise Information System (EIS)

Prototype - Design a prototype to enable the standardization of all SFA systems' reports. Implementation - Implement the system to enable the standardization of all SFA EIS reports.

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55	OCIO	Enterprise Supt	3. Enterprise Requirements Database			High	Cancel		Duplicate of IRB

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Initiative:

Enhanced Aid Origination & Funds Disbursement

Modify or simplify existing Loan Origination processes. Provide ability to originate and disburse all types of financial aid through a single delivery system.

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56	Students	Aid Origination and Disbursement	LC Web Application enhancements	Upgrading LC on-line application to be conform to the current paper version. Transitioning from fat client to thin client architecture.	Designed as an alternative means to initiate a Direct consolidation Loan using web authoring technology.	High	Done	CSTF	
57	Schools		LO generated Letters to Schools	LO generated letters to students are needed to prompt action by the borrower to sign their Pnote or request the school to forward to the LOC all booking transactions. For students whose loans have not been booked by LO due to any of the three items requ		High	Create Consolidated SFA Plan		
58	Students	Aid Origination and Disbursement	Loan Consolidation Cert	The current certification process exists in two forms: (a) paper for non-DoED lenders and guarantors, and (b) electronic for DoED/OSFA Direct Loan Program. Will put every lender on the same level playing field for loan pay-off activity. (STU019)	Enables electronic file transfer of large loan files requiring processing by affected lender(s). Provides efficiency in reducing the time required to complete loan pay-off certifications by private lenders/guarantors.	Medium	Continue - Project in Progress	Blueprint/CSTF	TO - 33

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59	Students	Aid Application	Replace SAR with letter	Scrap the Student Aid Reports (SAR) in its current format. Instead, send student applicants a plain language letter that clearly explains what's next, detail the information they provided, and explains how to correct any FAFSA errors.	Increase customer service	High	Continue - Project not yet Started	CSTF	Need data demonstrating need for this project
60	Students	Aid Application	Partner with tax software preparers	Partner with tax preparers and tax software developers to create products that put Form 1040 tax data into Free Application for Federal Student Aid (FAFSA) on the web.	Decrease the need for corrections or income data reported by families.	Low	Continue - Project not yet Started	CSTF	Need justification of cost savings and/or quantified improvements in customer service
61	Students	DL/CDS	Eliminate CDS	Elimate CDS. Replace necessary functionality in other systems. Eliminates delays in transaction processing, additional editing layer, and duplicated storage costs for data.		High	Create Consolidated SFA Plan		
62	Students	DL/CDS & DL/SS:	Mega-Record reconciliation with LO			Medium	Continue - Project not yet Started	Legislation	
63	Students	DL/CDS & DL/SS:	Filenet imaging system enhancements --- December 1999			Medium	Create Consolidated SFA Plan	Community	consolidate all ED document imaging and mailing at one site.

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Direct Loan Servicing Reengineering

Reduce cost while improving service to students and schools. Scope will include the existing processes and systems for the Schools Channel, including loan consolidation, central database functions, recording the loan on the servicing system, repayment, early collection efforts, and customer service. The systems review will include LCS, CDS, and DLSS (in whole or in part).

Line Num	Channel	Category	Project	Description	Benefits	Risk	Reccomendation	Blueprint/CSTF	Comments
64	Students	Loan Repayment	Analysis of Servicing/Collections Future Support	Analysis to determine the best approach for implementing new systems for Servicing and Debt Collection		High	Create Consolidated SFA Plan		Should include defaulted FFEL and Perkins loans and grant overpayments from FFEL DCS. A single ED payment system could manage all loan and grant payments to
65	Schools		Modify DLSAS cash detail record layout (LO)	The DLSAS record layout may cause some confusion when the schools review the GAPS adjustment versus the GAPS cancellations.	Will assist schools in their reconciliation process.	High	Create Consolidated SFA Plan		
66	Students	DL/CDS & DL/SS:	DL Servicing letters -- reduce # of letters			Medium	Continue - Project not yet Started	Community	
67	Students	DL/CDS & DL/SS:	CDS Release (99-R3) (Yr 00/01 changes)			Medium	Continue - Project not yet Started	Community	
68	Students	DL/CDS & DL/SS:	Band 1 DEC Alpha move (Servicing)			Medium	Continue - Project not yet Started	Blueprint	
69	COO		Modify DLSS	This initiative makes changes to the Direct Loan Servicing System that allows PLUS borrowers from the 50 Access America for Students pilot schools to have their PLUS loan serviced through the Student Account Manager instead of the Direct Loan	Allows PLUS borrowers at the 50 Access America for Students pilot schools to have their loan serviced by the Student Account manager instead of the Direct Loan Servicing System. As Access America for Students servicing volume increases, DLS processing co	High	Create Consolidated SFA Plan	Blueprint	

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70	CIO		Implement Pell Changes (NSLDS)	Changes to RFMS.	Software change(s) will ensure aid community is receiving the correct Pell payment information.	Medium	Continue - Project not yet Started		
71	Students	Loan Repayment	DL Servicing Interest rate discount CDS	Borrowers in repayment becoming delinquent	An incentive to borrowers to encourage timely payments and discourage delinquency and default	Low	Continue - Project not yet Started		Legislative/Regulatory requirement
72	Students	Loan Repayment	DL Servicing Interest rate discount DLS	Borrowers in repayment becoming delinquent	An incentive to borrowers to encourage timely payments and discourage delinquency and default	Low	Continue - Project not yet Started		

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Initiative: Enhanced Loan Repayment - Debt Collections
Determine the best approach for improving processes/methods for Debt Collections.

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73	Students	DL/CDS & DL/SS:	Electronic Bill Presentation and Payment extension			High	Create Consolidated SFA Plan	Blueprint	Needs to encompass all aid, not just DL to achieve Blueprint vision.
74	Partners		In cooperation w/guarantors, develop electronic pymt/rpting systems (PAR046)			High	Create Consolidated SFA Plan	CSTF	
75	Students	Loan Repayment	Analyze and Initiate Online Exit Counseling	Schools and students need access to both current and historical loan data to understand debt burden and to understand the implications of taking out Federal student loans. Currently, there is no automated mechanism to access all this data.	Online access to separate systems will be eliminated with all access provided through one system.	High	Create Consolidated SFA Plan	Blueprint	Should include total debt for borrower including grant overpays, Direct Loans, and FFEL obligations.
76	Students	DL/CDS & DL/SS:	Web-based deferment and forbearance requests			Medium	Create Consolidated SFA Plan	Blueprint	Needs to encompass all loans, not just DL to achieve Blueprint vision.

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Initiative:

Enhanced Monitoring of External Entities

Design and implement monitoring capabilities for existing channels including schools and financial partners as well as other external entities as required.

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77	Schools	PEPS:	PEPS to WEB			High	Create Consolidated SFA Plan	Blueprint	Unclear Need or Benefits. Wait for Re-design indicated by the other PEPS items and in Chapter 5 of the Modernization Blueprint?
78	Students	FFEL:	TO-XX Reengineer Lender System			Medium	Create Consolidated SFA Plan		Would assume this will be part of a larger
79	Schools		PEPS	The Eligibility/Certification module is the backbone of the PEPS system. This module was first developed in 1993 and is in great need of redesigning to accommodate changes in policy, reporting, business processes (case team approach) and legislative.	Create a state of the art module that will ease the workload of our users and provide a timely and accurate management tool for our customers in their oversight of institutions.	Medium	Create Consolidated SFA Plan		

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80	CIO		Broaden PEPS/NSLDS Data Exchange (School File)	Perform work identified in PEPS Phase 1 task order. This includes capturing all data provided by PEPS in its weekly feed (including DUNS and foreign address information) and working with PEPS to formulate a new feed to provide data needed by our customer	Improve SSCR processCapture Single Identifier informationCapture accurate more complete school data	High	Continue - Project in Progress		Project only includes "broaden PEPs"
81	Schools	PEPS:	Develop Admin Action and Appeals Module			Medium	Continue - Project not yet Started	Community	Unclear Need or Benefits.
82	Schools	PEPS:	Revised Security			Medium	Continue - Project not yet Started	Community	
83	Schools	PEPS:	Revised Elig. Cert. Module			Medium	Continue - Project not yet Started	Community	This is the heart and soul of PEPS. How much revision is necessary. Should it be deferred for a complete redesign to the Modernization Blueprint concepts after single school identifier issue is resolved
84	Schools	PEPS:	Revised Foreign School Functionality			Medium	Continue - Project not yet Started	Legislation	

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Web Portals Prototype

Design and implement a prototype to deliver capabilities for all students, schools, and/or financial partners and enable easier and more efficient data transfer through an internet interface.

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
85	Students	WEB	Same projects as "Web Portals for Customers" Initiative	This initiative is to build a prototype for the various web portal projects, but focused on the Student customer segment only.		Low	Create Consolidated SFA Plan		

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative: Web Portals for Customers
Design and implement online capabilities for all customers (students, schools, financial partners, etc.) to enable easier and more efficient data transfer through internet and/or other online interfaces (including Student Account Manager functionality).

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
86	Students	WEB	Application Status Checking on the Web			Medium	Continue - Project in Progress		
87	COO		Travel System for OSFA	Upgrade OSFA's electronic travel processing system.		Low	Continue - Project not yet Started	Blueprint/CSTF	
88	COO		Flexiplace Equipment Needs	Upgrade Begin to create the technology and management infrastructures to enable employees to work at home or at other sites when appropriate.		Low	Continue - Project not yet Started	Blueprint/CSTF	
89	Students	WEB	Full Corrections on the Web			Medium	Continue - Project in Progress		
90	Students	WEB	*Increase student access to CPS via the Web			High	Create Consolidated SFA Plan		
91	Students	WEB	*Add RAD request process to the Web			High	Create Consolidated SFA Plan		This is tied to FAFSA.
92	Students	WEB	*Collect student email/Provide automated notifications			High	Create Consolidated SFA Plan		
93	Students	DL/CDS & DL/SS:	Access America (mult svcrs) - On Hold per AAFS			Medium	Continue - Project not yet Started	Blueprint	

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

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Design and implement online capabilities for all customers (students, schools, financial partners, etc.) to enable easier and more efficient data transfer through internet and/or other online interfaces (including Student Account Manager functionality).

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
94	COO		Develop AAFS Gateway Website	To provide a single point of contact and improved service for students in the delivery of student financial aid and other government services.	Functionality will enable students and schools to obtain immediate access to student financial aid information as well a broad range of other government services and information for students. Addition of natural language search functionality will improv	High	Create Consolidated SFA Plan	Blueprint	Appears to provide same benefit as existing NSLDS system.
95	COO		Modify RFMS	This initiative makes changes to the RFMS origination system that allow AAFS pilot schools and their students to use the AAFS Student Account Manager as their only point of contact for Pell origination and disbursement records instead of going through RFMS.	Allows the AAFS pilot schools to send their data and dollars through the Student Account manager instead of RFMS. As Access America for Students volume increases, RFMS processing costs will decrease. Students will have immediate access to consolidated s	Medium	Continue - Project in Progress	Blueprint	
96	Students	WEB	*FAA Access to CPS via the Web			High	Create Consolidated SFA Plan		

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Web Portals for Customers

Design and implement online capabilities for all customers (students, schools, financial partners, etc.) to enable easier and more efficient data transfer through internet and/or other online interfaces (including Student Account Manager functionality).

Line Num	Channel	Category	Project	Description	Benefits	Risk	Reccommendation	Blueprint/CSTF	Comments
97	COO		Modify LO	This initiative makes changes to the Direct Loan Origination system that allow AAFS pilot schools and their students to use the AAFS Student Account Manager as their only point of contact for Direct Loan origination and disbursement records instead of goi	Allows the 50 Access America for Students pilot schools to send their data and dollars through the Student Account Manager instead of the LOC. As Access America for Students volume increases, LOC processing costs will decrease. Students will have immed	High	Continue - Project in Progress	Blueprint	Development underway. Nearly done.
98	COO		Modify CPS	It is necessary to modify CPS so it will accommodate the Access America for Students pilot requirements.	Makes it possible for AAFS pilot schools and students to utilize data and processes through	Medium	Continue - Project in Progress	Blueprint	Development underway. Nearly done.
99	CIO	Enterprise Supt	Student/Partner Web Page			High	Create Consolidated SFA Plan		
100	CIO		Improve SSCR Data Flow to Servicers	Due to the intermediate steps between NSLDS and servicers, the servicers currently receive outdated and redundant SSCR data that leads to improper servicing.	Providing data more quickly will result in interest savings due to borrowers entering repayment promptly.	High	Done		TO 34 underway at NSLDS.
101	Students	Aid Application	Simplify FAFSA Renewal	Simply FAFSA renewal: OSFA will fill out the forms, so students can simply sign and return them if there are no	Reduce burden on customers-increase customer service.	High	Done	CSTF	Scope of project

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

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Web Portals for Customers

Design and implement online capabilities for all customers (students, schools, financial partners, etc.) to enable easier and more efficient data transfer through internet and/or other online interfaces (including Student Account Manager functionality).

Line Num	Channel	Category	Project	Description	Benefits	Risk	Reccomendation	Blueprint/CSTF	Comments
102	CIO	Enterprise Supt	1. Student/Partner Web Page Development			High	Create Consolidated SFA Plan		
103	Students	DL/CDS & DL/SS:	Internet website enhancement (Exit counselling -- A PBO Performance			High	Create Consolidated SFA Plan	Legislation	DL portion is completed.
104	COO		Develop AAFS Student Account Manager	To give students and schools a single point of contact for Pell Grants and Direct Loans; to enable common business practices and standards; to provide improved customer service.	Single POC for students/ schools, better customer service, 24-hr customer info, consolidated student data, sharing of data between systems, cost efficiencies through use of COTS	High	Create Consolidated SFA Plan	Blueprint	
105	COO		Modify CDS	This initiative makes changes to the CDS that allows it to account for loans serviced through the Student Account Manager.		High	Create Consolidated SFA Plan	Blueprint	
106	CIO	IT Mgt	Increase FAFSA on the Web Capacity	Increase capacity to FAFSA on the Web site to allow more students to apply for Federal student aid over the web.	Allow more customers to file FAFSA using FAFSA on the Web application.	High	Create Consolidated SFA Plan		Funding seems too high. May need to investigate commercial alternatives.

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative: Web Portals for Customers
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<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
107	CIO	IT Mgt	Student/Partner Web Page Development. Includes On-line Help Wizard and Personalized Student Web Page.	Combines all web funding for development & processes in one area. Funding will provide OSFA web master with resources to do web initiatives throughout OSFA. Create an electronic "personal assistant" that would help students understand how to complete electronic processes, direct them to appropriate resources, and resolve issues and questions. Create a "smart" web page for students that reacts to the particular circumstances for each student. For example, if a student has multiple student loans with multiple lenders, the site would suggest consolidation to the		High	Create Consolidated SFA Plan	Blueprint	Organizational issue, not technical, what is \$2m cost for - development? This risks over-bureaucratizing web initiatives. Channel managers should have freedom to manage their channels.
108	Students	FFEL:	TO-XX WEB page for borrowers			Medium	Create Consolidated SFA Plan		Would assume this will be part of a larger

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative: Web Portals for Customers
Design and implement online capabilities for all customers (students, schools, financial partners, etc.) to enable easier and more efficient data transfer through internet and/or other online interfaces (including Student Account Manager functionality).

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
109	Students	Customer Satisfaction Mgt	Single Student Account	Establish a mechanism to allow students to have a single web interface to see details about their Title IV aid, including FFELP loans, Direct Loans, Perkins Loans, and		High	Create Consolidated SFA Plan	Blueprint/CSTF	Consolidate NSLDS, Access America, Highway/1 and other web account initiatives.
110	Students	Aid Awareness	Online Financial Planning Tool	Provide financial counseling tools that would allow students and families to estimate costs of attending school, financial aid required, financial aid eligibility, repayment obligations, and future earnings.	“At-risk” high school students and non-traditional students will be able to make decisions about postsecondary education without relying on the guidance of recruiters from specific institutions. These prospective students will be more likely to enroll i	High	Create Consolidated SFA Plan	Blueprint/CSTF	See feedback on community website. Private industry has provided web sit applications which already provide this service. However, if schools are willing to provide cost of attendance data for their institutions it may be possible to provide more useful information. As long as comparisons between individual award packages are avoided, schools might be willing to support this initiative. Recommend assessing institution support before proceeding. Also should estimate number of at-risk students who will be able to make decisions who otherwise would not have been able to.

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Web Portals for Customers

Design and implement online capabilities for all customers (students, schools, financial partners, etc.) to enable easier and more efficient data transfer through internet and/or other online interfaces (including Student Account Manager functionality).

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
111	CIO		NSLDS Common FFEL Format for Partners			High	Create Consolidated SFA Plan		

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Common Third-Party Interfacing

Implement a platform to provide standard interface capabilities for all SFA third parties (i.e., IRS, Department of Justice, etc.).

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
112	Students	DL/CDS & DL/SS:	Convert Credit Bureau reporting to Metro 2 format			Medium	Continue - Project not yet Started	Blueprint	Is this same as Credit Bureau reporting in FFEL DCS. Consolidate or re-use common code between both systems?
113	Students	CPS Main Frame	*Expand INS match, include secondary confirm.			High	Create Consolidated SFA Plan		
114			CAVIRS Data Match CPS	Provide ability to determine if applicants have previously defaulted on any government loans to prevent defaulters from obtaining Title IV aid.	Unquantifiable until statistical analysis is provided.	Low	Continue - Project not yet Started		

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Consolidated Data Center (VDC)

Design and implement a Virtual Data Center (VDC) to streamline call center operations and “host” all Department of Education systems at a single data center. Includes procedures and processes about day-to-day operations.

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
115	CIO	IT Mgt	VDC Hardware Acquisition	Obtain required hardware for modernization, including storage area for middleware, additional CPU's, etc.	Necessary to implement modernization blueprint.	Low	Continue - Project not yet Started	Blueprint	
116	CIO	IT Mgt	Data Center Consolidation (VDC) DLS	Initiative to consolidate Stovepipe Systems into a single data center.	Lower operational costs	Medium	Continue - Project not yet Started	Blueprint	Savings has not been quantified
117	CIO	IT Mgt	VDC Telecommunications	Consolidate SFA telecommunication requirements into one VDC.		High	Create Consolidated SFA Plan	Blueprint	
118	OCIO	Enterprise Supt	2. VDC Telecommunications			High	Cancel		Duplicate of other project.

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative: Consolidated Third-Party Support Services
Streamline contracting with external vendors to manage services provided to SFA. Perform analysis and implement consolidated services such as fulfillment, imaging, and lock box.

Line Num	Channel	Category	Project	Description	Benefits	Risk	Reccomendation	Blueprint/CSTF	Comments
119	CIO	IT Mgt	Consolidate Support Services	Perform analysis and implement consolidated services such as fulfillment, imaging, lockbox, etc.	Reduces costs, improved processing and customer service.	High	Create Consolidated SFA Plan	Blueprint	

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Enhanced Outreach Services for Under Served Populations

Improve the external communications to partners and borrowers to disseminate information on changes to existing programs, technology, etc. for the under-served customer markets.

Includes initiating projects with partners to research, develop, and promote best business practices, new products, and improved customer service (e.g., Partnership Council Teams).

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
120	Students	Aid Application	Test FAFSA with students and parents	Test all annual changes to the FAFSA with numerous focus groups and various testing, (i.e. beta) consisting of secondary and Postsecondary students and their parents.	Improve customer service	Medium	Continue - Project not yet Started	CSTF	

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Single Identifier for Each Entity (Includes PIN usage)

Design a uniform single identifying data element for each customer entity in SFA's system including students, schools, and financial partners. Include the use of PIN logic as a form of identification.

Line Num	Channel	Category	Project	Description	Benefits	Risk	Recommendation	Blueprint/CSTF	Comments
121	Partners		Loan Number Standardization	Develop a standard identifier for loan numbers.	Streamlined processing, fewer errors.	High	Create Consolidated SFA Plan	Blueprint	Requires consensus with lenders and GAs.
122	Partners		Provide DUNS to guarantors electronically	Give guarantors Dun and Bradstreet (DUNS) numbers electronically, so they can update their participant	Improve customer service.	High	Create Consolidated SFA Plan	CSTF	
123	Partners		Financial Institution Identifier Standardization	Develop a standard identifier for financial institutions.	Streamlined processing, fewer errors.	High	Create Consolidated SFA Plan	Blueprint	
124	CIO		Single Identifier Analysis	Analyze the risks, benefits, and methodologies for implementing a single school identifier including the analysis of DUNS, OPE ID, Grantee Award Number across all legacy systems.		High	Create Consolidated SFA Plan		Standard identifier is "lynchpin" of modernization. Student's institution, school, agency, etc. must be resolved. Resolution critical to modernizing, no progress will be made without this. This has been discussed and studied for years with no result/resolution. These are very political / customer services related. Many Ids will integrate with the new financial system. Consider separate overarching project to address all identifiers.
125	Students	FFEL:	TO-XX Single School Identifier			Medium	Continue - Project not yet Started		Need more detail.

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Performance Measurements Analysis & Design

Develop a process and framework for establishing, tracking, and reporting SFA current and target performance measures. The goal is to use the performance measures to understand, predict, and improve performance.

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
126	CIO	Enterprise Supt	High-Level Enterprise Information System (EIS) Prototype	Develop prototype system for reporting executive level information on business performance.		Low	Create Consolidated SFA Plan		
127	CIO	Enterprise Supt	Performance Measurements Analysis and Design	Develop process for identifying and measuring performance metrics for individual products / programs.		Low	Create Consolidated SFA Plan		

Report 1: IRB and Development Requests Mapping (mapped to initiatives)

Initiative:

Existing Modernization Projects & Other SFA Initiatives - Enhanced Procurement Process

Evaluate all initiatives currently being pursued under the Modernization Partner Project, including the enhancement of the procurement process.

<i>Line Num</i>	<i>Channel</i>	<i>Category</i>	<i>Project</i>	<i>Description</i>	<i>Benefits</i>	<i>Risk</i>	<i>Reccomendation</i>	<i>Blueprint/CSTF</i>	<i>Comments</i>
128	CIO	Enterprise Supt	1. Task Modernization			High	Create Consolidated SFA Plan		
129	OCIO	Enterprise Supt	Modernization Partner Services			Medium	Continue - Project not yet Started		
130	CIO	Enterprise Supt	1. Procure IV&V Services			High	Create Consolidated SFA Plan		
131	CIO	Enterprise Supt	Implement Modernization Infrastructure			High	Create Consolidated SFA Plan		
132	OCIO	Enterprise Supt	IV&V Services			High	Cancel		Duplicate of IRB